



# Stock Transfer Form

## Information for your Broker

To make a broker-to-broker transfer, your broker will require the following written instructions.

Foundation Broker:  Morgan Stanley	DTC Participant #: 0015	The Curtis Group at Graystone Consulting
	Foundation Account #: 662-046923-051	1400 Page Mill Rd, Palo Alto, CA 94304 650.496.4260 www.morganstanleygc.com/curtisgroup
	Foundation Taxpayer ID #: 83-0400149	Account Manager: Thomas McCue

### The Catholic Community Foundation

777 North First Street, Suite 490, San Jose, CA 95112

Phone: 408.995.5219 Fax: 408.995.5865 Primary Contact: Sean Finigan [finigan@catholiccf.org](mailto:finigan@catholiccf.org)

## Information for the Catholic Community Foundation

Once the stock is transferred, please fill out and send the following information to the Catholic Community Foundation via fax or email.

Date of Transfer: \_\_\_\_\_ Donor Name(s): \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

For the benefit of (fund name): \_\_\_\_\_

Gift Restrictions? \_\_\_\_\_ Pledge Payment?  Y  N

Name of Stock: \_\_\_\_\_ Symbol: \_\_\_\_\_ # of Shares: \_\_\_\_\_

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